



## TRIAD BENEFITS GROUP

### DOCUMENTS NEEDED – BRING TO INITIAL MEETING

The following documents will be needed to properly study, analyze, and prepare a personalized, comprehensive wealth plan for you. In order to make suitable recommendations, it is essential to fully understand your current financial snapshot in detail. This material will be treated confidentially and returned when the planning process is completed, or upon request.

#### Personal Files

- Latest income tax returns (including all interests such as a business or farm)
- Loan documents (showing monthly payment, interest rate, loan term, principal due)
- Wills and Powers of Attorney
- Trust Agreements
- Major asset purchase details (such as home, cars, rental properties)
- Other \_\_\_\_\_

#### Employer

- Payroll or other income statements
- Employee benefits booklets (showing insurance options and total benefits package)
- Retirement savings plans (401k, 403b booklets including fund lineups showing all funds)
- Pension plans (projection statement of monthly benefit at normal retirement age, 65)
- Other \_\_\_\_\_

#### Bank or Credit Union

- Checking account statements; a working knowledge of your banking balances and usage
- Latest Savings/CDs/Money Market account statements
- Credit Card statements, or a working knowledge of your balances
- Other \_\_\_\_\_

#### Broker or Mutual Fund Company

- Latest statements (less than 90 days old), of any Roth IRA, IRA, or regular taxable account
- Other \_\_\_\_\_

#### Insurance Company

- Latest life insurance/annuity account statements
- Health insurance/hospital & major medical policy information
- Disability income insurance policy information
- Property & Casualty policy information
- Long-Term Care policy information
- Other \_\_\_\_\_

#### Business

- Buy-Sell Agreements
- Deferred Compensation Agreements
- Stock/Option/Bonus Plans
- Other \_\_\_\_\_